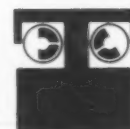


TRAVEL PRINTOUT



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U.S.
Travel
Data
Center



Research News for the U.S. Travel Industry

March, 1984

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STATE TRAVEL ADVERTISING BUDGETS GROW 14 PERCENT IN 1983-84

Tourism development offices in 48 states plan to spend \$47 million for travel advertising in 1983-84, according to the 1983-84 Survey of State Travel Offices soon to be released by the U.S. Travel Data Center.

The survey reports a 14 percent increase in travel advertising budgets for these states from the previous year.

The average state will devote more than \$982,900 to advertising, over one-third of the average total travel promotion and development budget.

All 50 states plan to spend a total of \$147 million on all travel and tourism development programs in 1983-84, 15 percent more than the previous year. These programs include promotion, public relations, highway welcome center operations, and research, as well as advertising. For the first time, the average state travel development budget tops \$2.9 million.

"State travel development budgets increased significantly faster than inflation this year," commented Dr. Douglas C. Frechtling, Data Center director. "States are competing more aggressively than ever for shares of the nation's \$200 billion travel market."

Not all states are sharing in travel development budget growth. Eight states will spend less than during the previous fiscal year, while 42 will spend more.

Florida leads all states and territories with a travel development budget of \$8.9 million. Seven other states will spend \$5 million or more during 1983-84. Of all states, the state of California will spend the least on travel development: \$492,370.

The Survey of State Travel Offices, 1983-84 is the eleventh annual report on the budgets, advertising, and programs of the state and U.S. territory tourism

development agencies. The 100-page report is available for \$50.00 prepaid from the U.S. Travel Data Center, 1899 L Street, N.W., Washington, D.C. 20036.

This study was supported by a grant from the Travel Industry Association of America.##

SEMINAR PRESENTS EXPANDED SUMMER VACATION TRAVEL OUTLOOK

The third annual summer vacation travel forecast will be unveiled at a seminar sponsored by the U.S. Travel Data Center, 9:00 a.m. on May 10 at the Ramada Renaissance Hotel in Washington.

In addition to predicting the volume of travel during the June-August vacation season in 1984, the forecast has been expanded this year to include travelers' preferences for types of destinations, travel budgets compared to those of last summer, and perceptions of the costs of various travel services and destinations.

The seminar will also cover the impact of changes in inflation, unemployment and overall business conditions since summer 1983. It will include forecasts of how individual travel markets will fare during the summer of 1984 and examine travel patterns of last summer. Demographics, transport modes, and regional visitation outlooks will be reviewed, with time for discussion of implications for travel marketers.

Forecasts will be based on telephone interviews with over 3,000 U.S. adults through the Data Center's continuing National Travel Survey, now in its sixth year.

Registration cost is \$60 for Data Center limited members and \$75 for non-members. There is a late registration (Continued on page 3)

TRAVEL PRICES JUMP IN JANUARY

Led by large increases in lodging rates and intercity bus fares, the cost of travel in the U.S. in January 1984 jumped 0.8 percent, according to the U.S. Travel Data Center's Travel Price Index (TPI), released today. This increase is an abrupt reversal of the 0.6 percent decline registered during December.

For comparison, the Consumer Price Index (CPI) rose 0.6 percent on a seasonally unadjusted basis in January, up from the 0.1 percent rise during December.

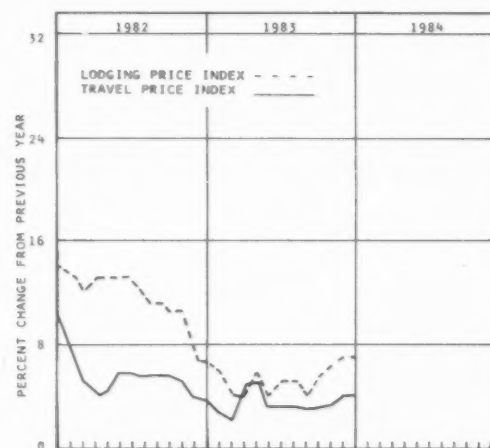
The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation, and other goods and services purchased by Americans traveling away from home in this country, stood at 355.1 in January (1967=100).

Bus fares jumped 4.9 percent while the cost of lodging out of town rose 2.8 percent during the one-month period. Intercity train fares also showed substantial growth, up 0.8 percent.

On the other hand, gasoline prices dropped 1.3 percent from December's

level, while the cost of incidental purchases fell 0.6 percent.

Both the TPI and CPI have increased 4.1 percent since January of last year. Intercity bus fares have grown 11.4 percent, leading all TPI components during this period. On the other hand, gasoline prices are still 0.4 percent below January 1983 levels.##



LODGING PRICES CONTINUE TO INCREASE IN JANUARY

Monthly and Annual Rates of Change in the Travel Price Index and Components,
January, 1984

TPI Component	Monthly Percent Change December, 1983 to January, 1984	Annual Percent Change January, 1983 to January, 1984
Transportation	-0.2	2.4
Airline Fares	0.4	4.4
Intercity Bus Fares	4.9	11.4
Intercity Train Fares	0.8	6.2
Taxicab Fares	0.2	2.4
Gasoline	-1.3	-0.4
Lodging	2.8	7.0
Food Away From Home	0.5	4.0
Entertainment Services	0.3	4.7
Incidentals	-0.6	2.7
TRAVEL PRICE INDEX	0.8	4.1
CONSUMER PRICE INDEX	0.6	4.1

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, N.W., Washington, D.C. 20036. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director. Ida Simmons, Editor. TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for \$45 per year, U.S., Canada, and Mexico; other foreign countries, \$55 per year, payable in U.S. funds only.

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DECEMBER WEATHER DAMPENS TRAVEL SPIRITS

During the coldest December on record, travel in America fell 15 percent, according to the U.S. Travel Data Center's latest National Travel Survey report.

The monthly telephone survey reported U.S. residents took 80 million person-trips in December, compared to 93.9 million during the same month of 1982. (A person-trip is recorded each time anyone goes 100 miles or more away from home.)

Although almost half of all December person-trips were to visit friends and relatives, travel for this purpose declined significantly from year earlier figures. On the other hand, business/convention travel continued to recover and during the final three months of the year, grew one-quarter over levels recorded during the depressed fourth quarter of 1982. Travel for outdoor recreation, sight-seeing and entertainment grew 10 percent in December.

Contrary to the trend toward longer trips in recent months, the average trip in December included about the same duration as in the previous year, 4.6 nights away from home. Moreover, the average round-trip distance fell 40 miles to an average 760 miles.

Despite the overall decline in travel, air travel remained strong, accounting for 22 percent of all person-trips taken in December. Travel by auto/truck/recreational vehicle, affected by the drop in trips to visit friends and relatives, declined 24 percent.

The most popular destination region, the Mountain West/Far West, attracted 24 percent of all travelers, perhaps because the southern portion of this

region was the only part of the country that escaped the severe cold weather in December. This region also generated the most travelers.

For the tenth consecutive month, the National Travel Survey reported an increase in plans to travel during a vacation. In December, 4 percent more adults said they are planning a vacation trip than one year earlier. Forty-seven percent of those planning a vacation trip intend to travel by personal motor vehicle, and 37 percent by air, a considerable increase over the previous year.

Half of all vacationers are planning to use commercial lodging and are planning trips longer in both distance and duration than a year ago.

Plans to visit The South declined 8 percent from a year earlier; however, that region is still the most popular, and one-quarter of all vacationers plan to visit destinations there. Twenty-two percent plan to visit the Mountain West/Far West, a substantial increase over 1982.

The National Travel Survey is a monthly telephone survey of over 1,400 American adults. Results are projectable to the total adult population.##

SEMINAR (CONTINUED FROM PAGE 1)

fee of \$5.00 after May 1. The registration fee includes a complimentary copy of the 1984 Outlook for Summer Travel: A Guide to Vacation Markets.

For further information and hotel registration forms, contact Manager of Communications, U.S. Travel Data Center, 1899 L Street, N.W., Washington D.C. 20036 or phone 202/293-1040.

Those unable to attend may order the 1984 Outlook for Summer Travel: A Guide to Vacation Markets by sending \$60.00 prepaid to the U.S. Travel Data Center. The publication will be available after May 10.##

States comprising the travel regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. EASTERN GATEWAY: New York, New Jersey. GEORGE WASHINGTON COUNTRY: Delaware, District of Columbia, Maryland, Pennsylvania, Virginia, West Virginia. SOUTH: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee. GREAT LAKES COUNTRY: Illinois, Indiana, Iowa, Michigan, Minnesota, Ohio, Wisconsin. MOUNTAIN WEST: Colorado, Montana, Nebraska, North Dakota, South Dakota, Utah, Wyoming. FRONTIER WEST: Arizona, Kansas, Missouri, New Mexico, Oklahoma, Texas. FAR WEST: Alaska, California, Idaho, Nevada, Oregon, Washington. THE ISLANDS: American Samoa, Guam, Hawaii, Northern Marianas, Puerto Rico, Virgin Islands.

CURRENT TRAVEL INDICATORS

	December, 1983	% Change from November, 1983	% Change from December, 1982	Year-to-date % Change 1983/1982
Establishment receipts or retail sales				
Hotels, motels and other lodging places ¹	\$ 2,133 million	-3.1	10.1	7.3
Eating and drinking places ²	\$ 9,949 million	-3.7	6.5	11.2
Gasoline service stations ²	\$ 8,878 million	1.1	2.9	-0.5
Commercial lodging demand				
Hotel/motel occupancy rate ³	67.7 percent	2.0	1.8	0.6
Real demand for commercial lodging ⁴	\$ 804 million	-2.0	3.6	2.1
Airline passenger traffic⁵				
Domestic revenue passenger-miles	15.2 billion	7.6	0.8	5.4
International revenue passenger-miles	3.8 billion	8.8	15.3	11.3
Bus passenger traffic⁶				
Intercity bus passenger-miles	1.8 billion	1.7	-4.2	-1.6
Highway traffic volume⁷				
Rural arterial vehicle-miles	33.1 billion	-4.5	1.3	4.1
Rail passenger traffic⁸				
Amtrak passenger-miles	394.7 million	17.8	14.5	5.4
Travel Price Index⁹				
Travel Price Index ⁹	352.4	-0.6	3.9	3.4
U.S. resident travel¹⁰				
Total person-trips	80.0 million	-13.4	-14.8	-1.1
Vacation person-trips	55.4 million	14.7	-10.4	-2.7
Public use of National Parks¹¹				
Visits	N/A	N/A	N/A	N/A
Overnight stays	N/A	N/A	N/A	N/A
Foreign arrivals in U.S.¹²				
From overseas	N/A	N/A	N/A	N/A
From Canada	619,484	-11.8	15.0	16.6
U.S. citizen departures¹²				
To overseas	N/A	N/A	N/A	N/A
To Canada	319,533	-27.2	-23.6	-1.0
Domestic demand for motor gasoline¹³				
Barrels per day	6,614 thousand	-0.2	1.0	0.9

¹Source: Laventhol and Horwath, seasonally unadjusted. ²Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. ³Source: Laventhol and Horwath, seasonally adjusted. ⁴Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. ⁵Preliminary; U.S. scheduled service air carriers. Source: Civil Aeronautics Board. ⁶All carriers regular route and charter service. Source: American Bus Association. ⁷Source: Federal Highway Administration. ⁸Source: National Railroad Passenger Corporation (Amtrak). ⁹Source: U.S. Travel Data Center and Bureau of Labor Statistics. ¹⁰Source: U.S. Travel Data Center. ¹¹Preliminary; unadjusted for differences in reporting units. Source: National Park Service. ¹²Source: U.S. Travel and Tourism Administration and Nettelton Travel Research Center. ¹³Preliminary; Source: U.S. Department of Energy.

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